



Sustainable and health tourism

S3 Montenegro

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Covid 19 – change of perspective.

**Opportunity or threat
for sustainable and health tourism
in Montenegro?**

International tourist arrivals - World

International
Tourist
Arrivals

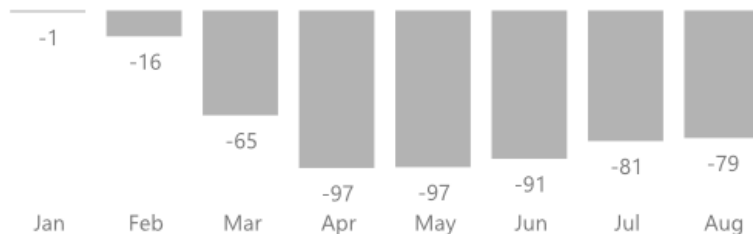
YTD change (%)

-70

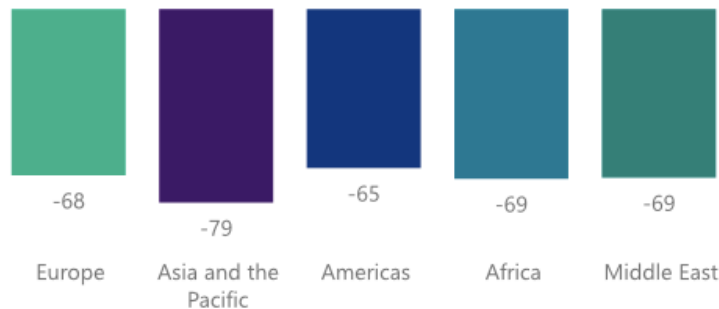
Data available through:

August

Change by month (%)

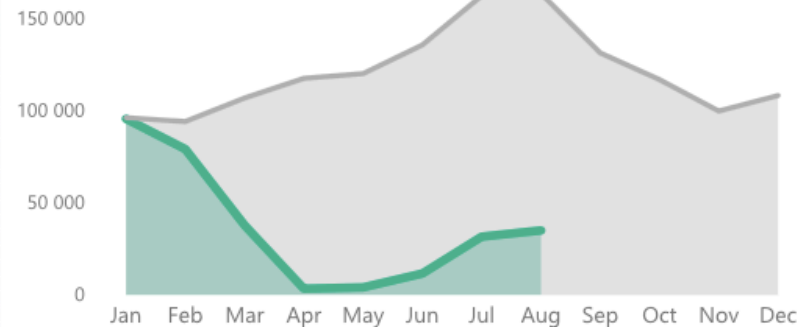


YTD change by region (%)

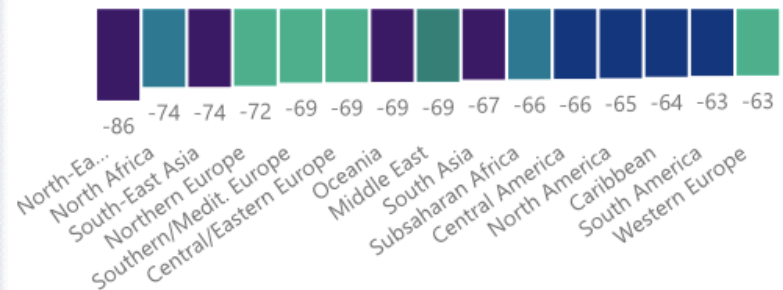


International tourist arrivals (thousands)

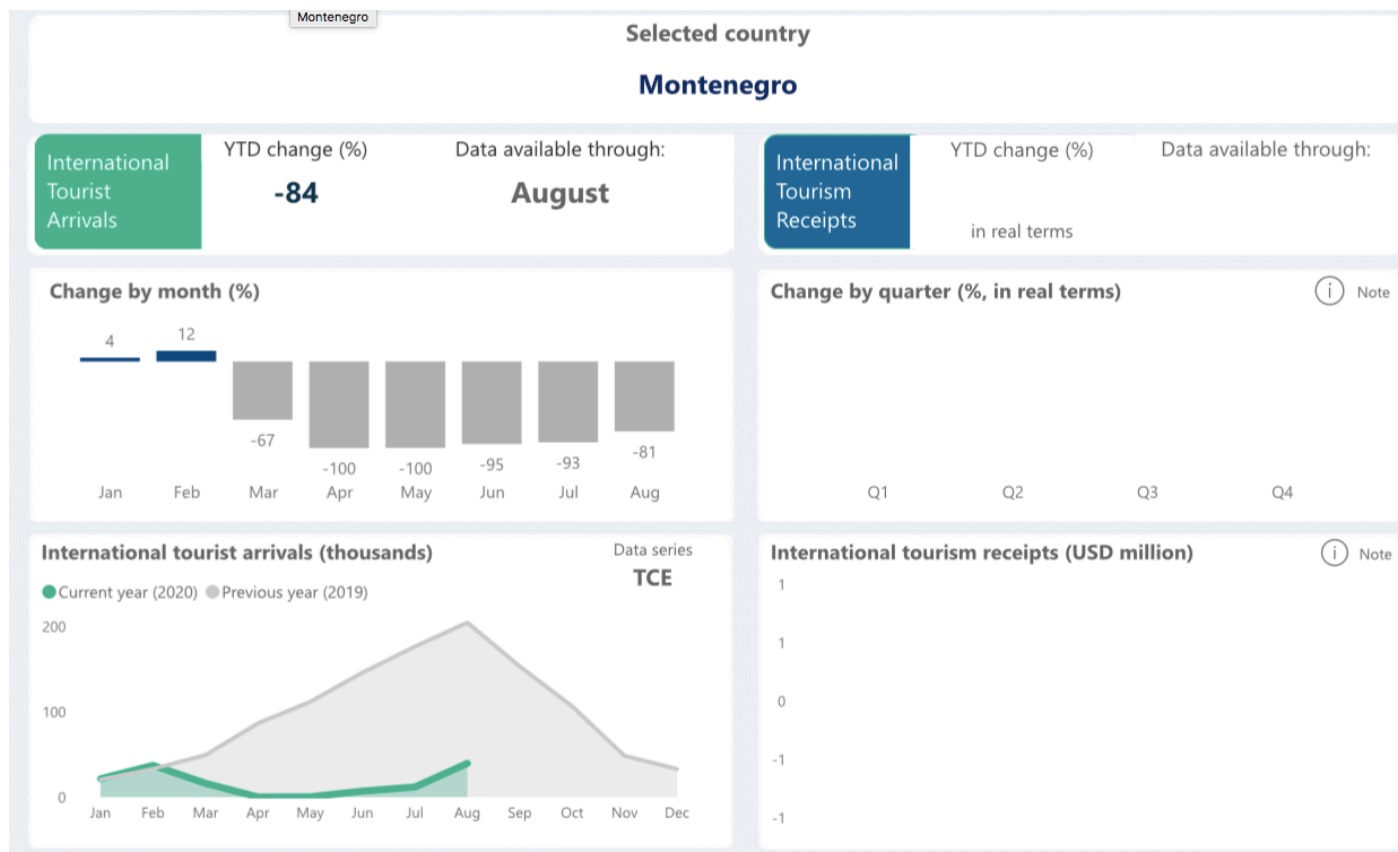
● Current year (2020) ● Previous year (2019)



YTD change by subregion (%)

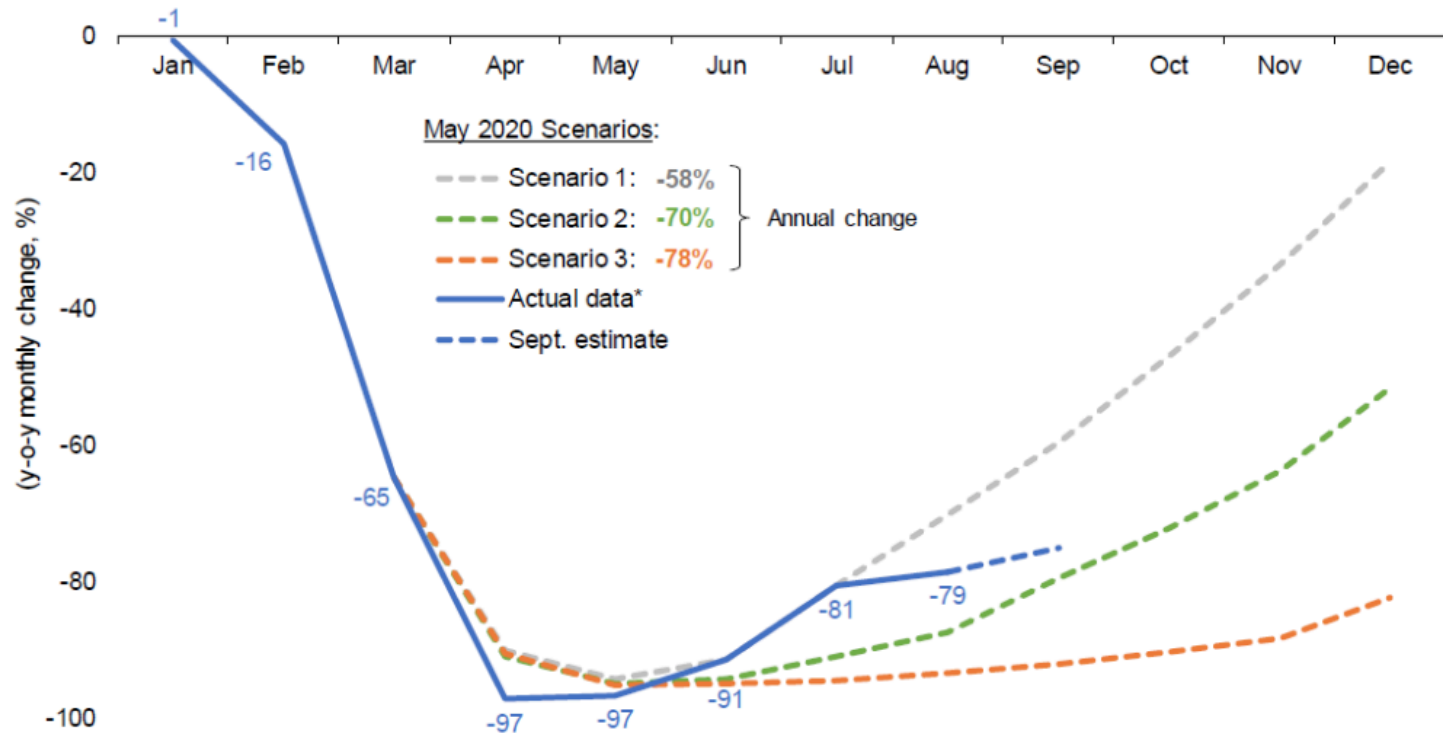


International tourist arrivals - Montenegro



International tourist arrivals in 2020: three scenarios (YoY monthly change, %)

International tourist arrivals in 2020: YTD results and scenarios (y-o-y monthly change, %)



Source: World Tourism Organization (UNWTO)

(Data collected October 2020)

* Actual data through August includes estimates for countries which have not yet reported monthly results.

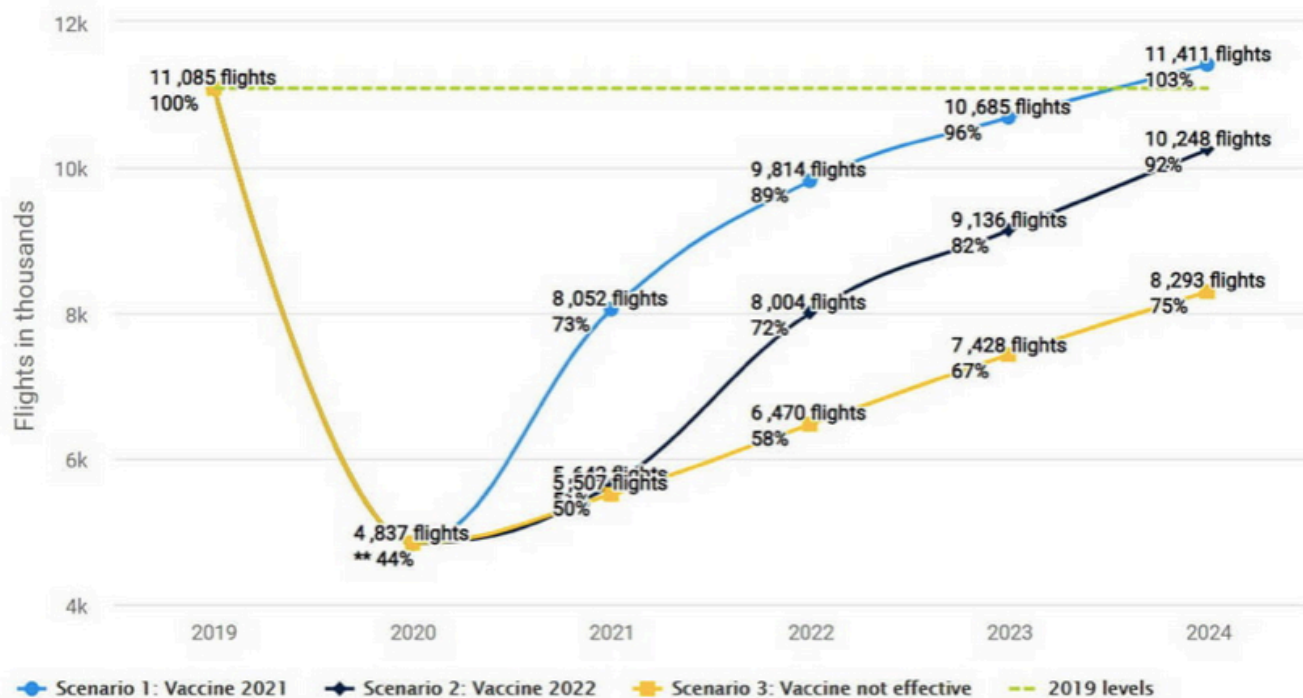
Note: dotted blue line corresponds to UNWTO estimate for September 2020.

Loss of 850 million to 1.1 billion international tourists.

Forecast of air traffic in Europe

Forecast for *Europe 2020-2024

Actual and % change compared to 2019



EUROCONTROL STATFOR 2020

*Europe = ECAC 44 Member States

**Forecast 2020 based on scenario 2

Winners of COVID 19 - wellness and tech

The current situation (after 8+ months of the pandemic) and the difficulties coming ahead are not conducive to greater wellbeing and happier societies. Some obvious “wellbeing-crushers”: anxiety, lockdowns, social and political polarization, deep uncertainty about the future, fear of unemployment, fear of COVID-19.

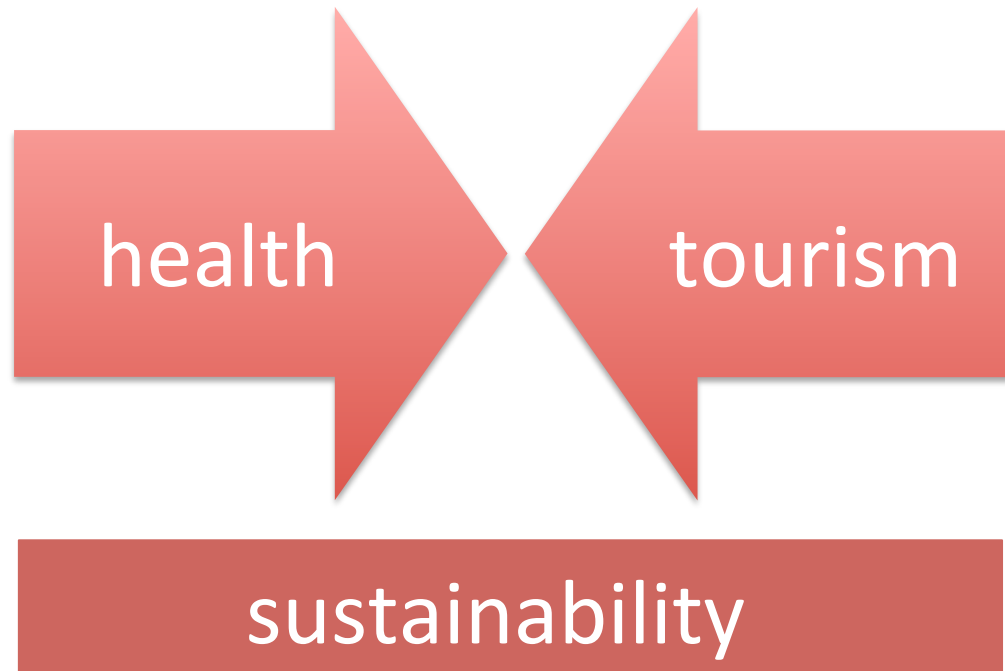
There are two major and clear industry winners from COVID-19:

- (1) **tech** (because it makes our lives easier) and
- (2) **wellness** (because we value what it can offer us far more).

The pandemic has woken us up to two BIG things:

- (1) the **critical importance of nature**—the wellbeing of our planet is inseparable from our own individual wellbeing and
- (2) the **critical importance of wellness as a preventative “tool”**—wellness precedes health and not vice versa.

Sustainable and health tourism



Sustainability and responsibility have become key criteria in health tourism, which often relies on natural resources and assets.

Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.

Sustainability as a lifestyle

Sustainability is no longer a trend, but a lifestyle embraced by more and more people. **More and more people want to travel green:** if in 2016 62% of travelers wanted to stay in an eco-sustainable hotel, now it is 73% who want to do so.

The biggest part of travelers all over the world wants to organize a sustainable travel. In particular, 72% of them believe in the need of eco-sustainability while traveling.

Some difficulties:

- “I do not know how to make my vacation more sustainable” (37%)
- “Other non-sustainable travels’ offers are more convenient” (34%)
- “Extra expenses of a sustainable journey are too high for me” (36%)
- “I want to understand **what I can do** to improve my sustainability on holiday” (50%)

Experiential tourism, digital detox and immersion in nature

When we travel we want to learn something new, to know the locals and their traditions, we search for **experiences**. Tourists try to live unforgettable activities that involve **all the senses**.

We constantly use social media, the internet and never forget our phone at home. And now more and more people feel the need to detox from the web, at least on vacation. **Digital Detox** holiday is an ever growing tourism trend. Tourists want to experience some off-grid days, connected **only with nature**.

Covid19 and the rise of sustainable tourism

- In an era of lockdown and social distancing there is a profound new value being placed **on nature and wilderness as healing**.
- Many destinations turn into sustainable tourism – the **competition** is growing, there is a need for delivering **clear reason to believe**.
- **the need for visitors to adopt a respectful approach** - strong need of better education of tourists.

Sustainable and **HEALTH** tourism

Wellness tourism aims to improve and balance all of the main domains of human life including physical, mental, emotional, occupational, intellectual and spiritual. The primary motivation for the wellness tourist is to engage in preventive, proactive, lifestyle enhancing activities such as **fitness, healthy eating, relaxation, pampering and healing treatments**.

Medical tourism is a type of tourism activity which involves the use of evidence-based medical healing resources and services (both invasive and non-invasive). This may include **diagnosis, treatment, cure, prevention and rehabilitation**.

(UNWTO, 2018)

Physical Healing	Beauty Treatments	Relaxation/Rest	Leisure/Entertainment	Life/Work Balance	Psychological	Spiritual
Medical spas/baths	Cosmetic surgery trips	Pampering spas/baths	Spa resorts with „fun waters“	Holistic centres	Holistic centres	Meditation retreats
Surgery trips	Hotel/day spas	Wellness hotels	Sport/fitness holidays	Occupational wellness workshops	Workshops (e.g. Hoffmann psycho drama)	Yoga centres
Rehabilitation retreats		Thalassotherapy centres				Pilgrimages

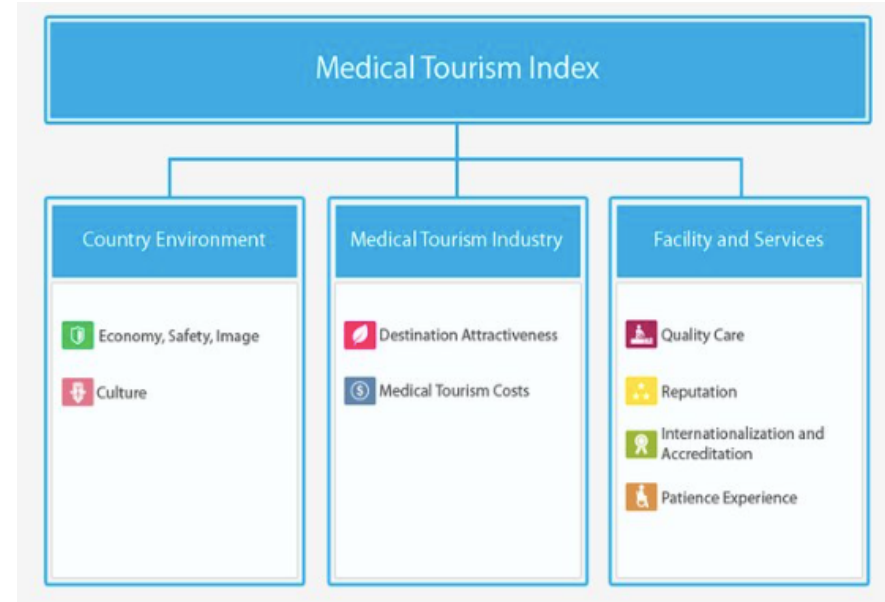
Source: Smith, M., Puczko, L.: **Health and Wellness Tourism. 2009, p.84.**

MONTENEGRO: rehabilitation, prevention, dentistry and aesthetic surgery, neuroses, anaemia, respiratory diseases, allergies, oncology, in vitro fertilization, ophthalmology, addictions.
Flagship project: Adriatic Centre for bone and muscular system diseases.

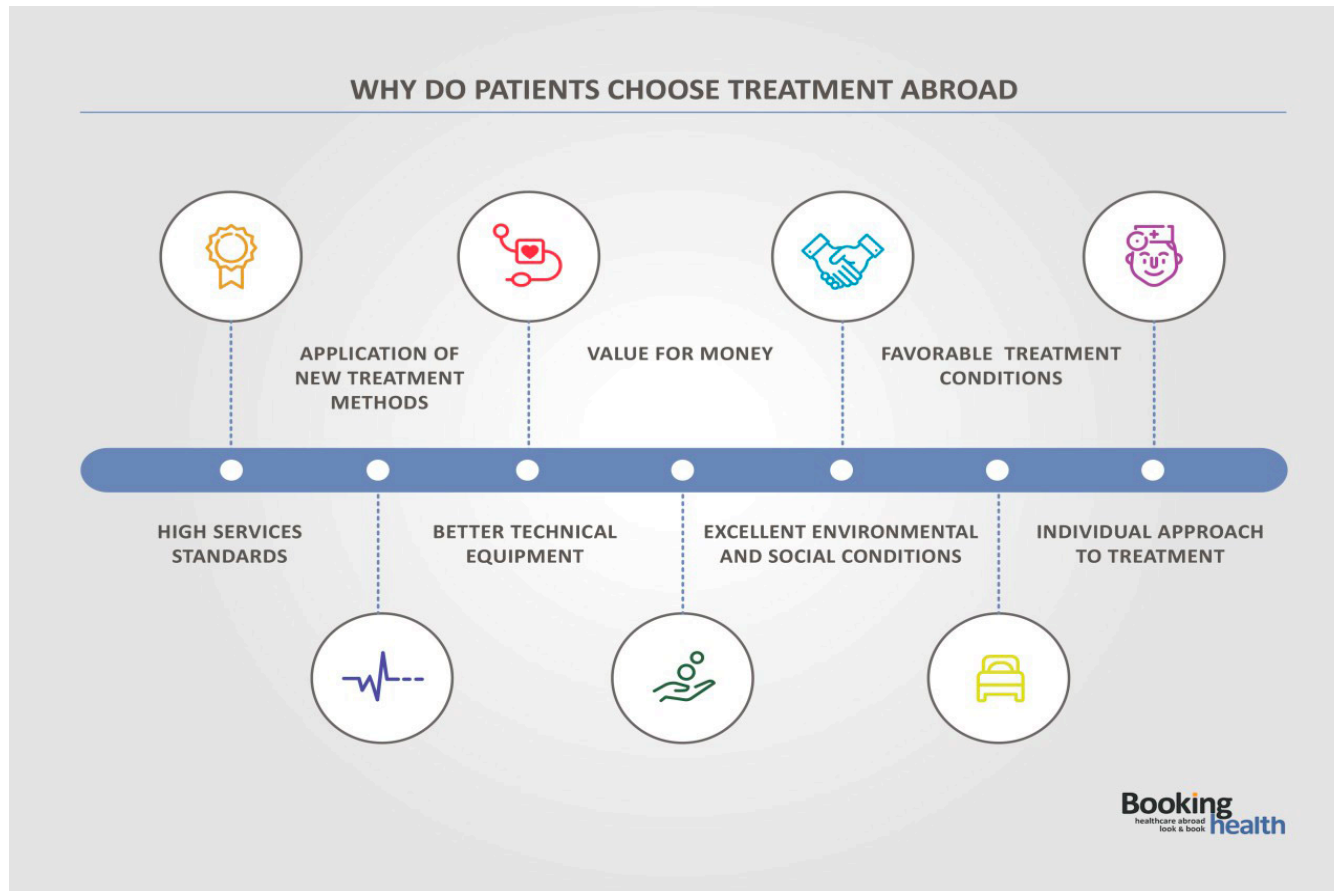
Medical Tourism Index 2020-2021, July 2020

#1 Canada 76.47

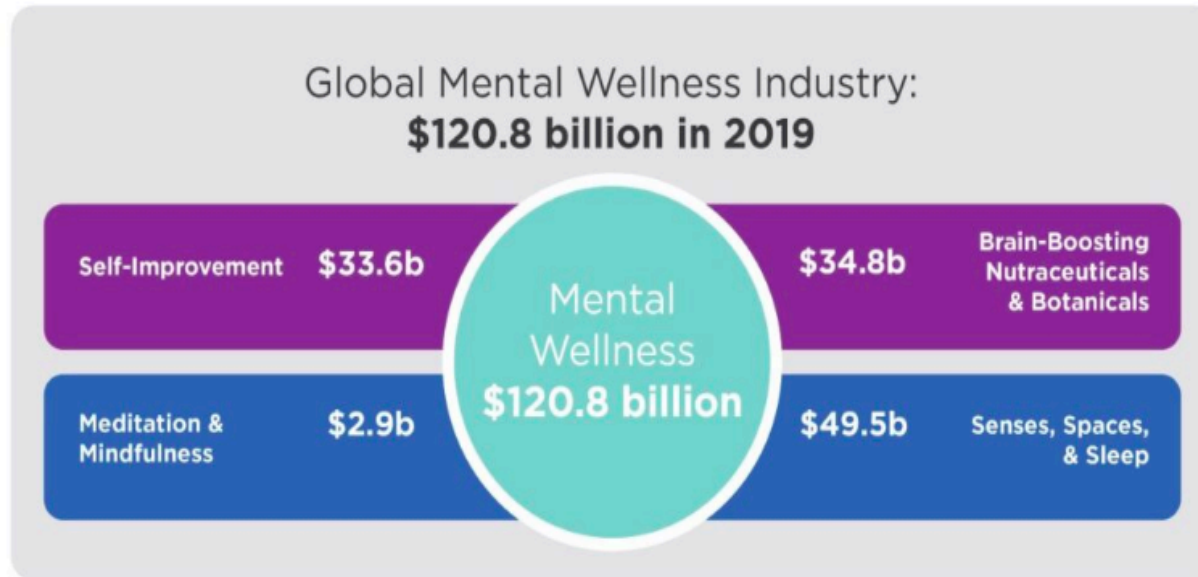
2. Singapore	76.43		25. Colombia	64.95	
3. Japan	74.23		26. Egypt	64.81	
4. Spain	72.93		27. Malta	64.75	
5. United Kingdom	71.92		28. Brazil	64.35	
6. Dubai	71.85		29. Poland	64.10	
7. Costa Rica	71.73		30. Turkey	63.91	
8. Israel	70.78		31. Morocco	63.80	
9. Abu Dhabi	70.26		32. Bahrain	63.65	
10. India	69.80		33. China	63.47	
11. France	69.61		34. Greece	63.45	
12. Germany	69.29		35. Saudi Arabia	63.32	
13. Oman	69.03		36. Jordan	63.26	
14. South Korea	68.81		37. Panama	62.77	
15. Czech Republic	68.32		38. Tunisia	61.78	
16. Taiwan	67.93		39. Qatar	61.13	
17. Thailand	66.83		40. Jamaica	60.74	
18. Italy	66.75		41. Russia	60.17	
19. Dominican Republic	66.32		42. Mexico	59.47	
20. Argentina	66.26		43. Lebanon	57.14	
21. Portugal	65.96		44. Guatemala	55.04	
22. South Africa	65.82		45. Kuwait	54.84	
23. Hungary	65.69		46. Iran	44.38	
24. Philippines	64.99				



Reasons to choose treatment abroad



Mental wellness becomes a new “industry bubble”



*Note: Numbers do not sum to total due to overlap in segments.
Source: Global Wellness Institute*

3.3 Travelled alone or with a partner

42% of medical tourists travelled on their own, while the rest (68%) travelled with a relative or friend. These numbers emphasise the need for patient support to solo travellers during a visit for treatment, and to consider the requirements of traveling companions.

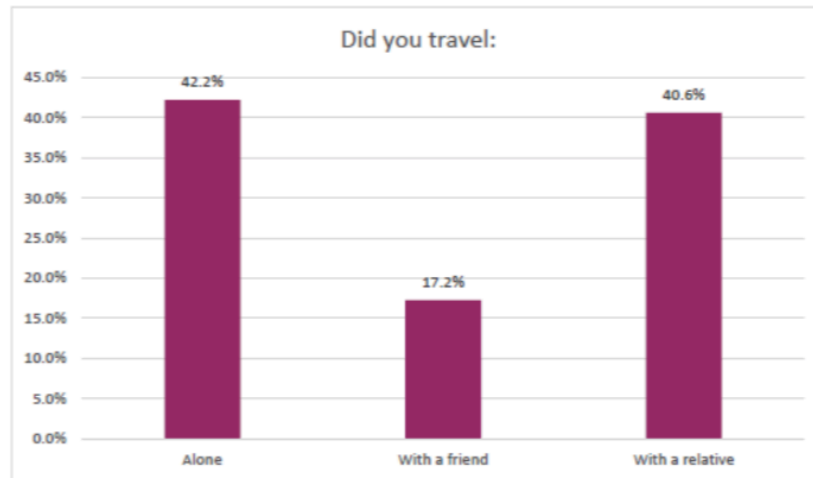
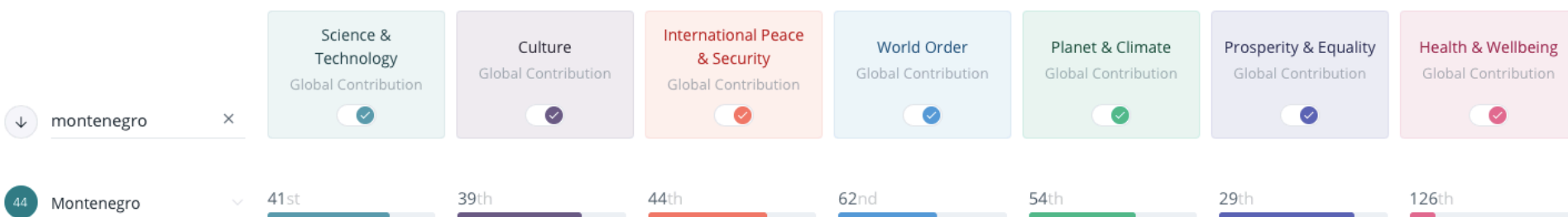


Table 1. Regional differences and trends in Europe in the approach to health and wellness tourism

Region/countries	Typical focus	Typical products/services
Western Europe (Austria, Belgium, France, Germany, Luxembourg, Netherlands, Northern France, Switzerland, United Kingdom)	Beauty, weight loss, lifestyle improvements (e.g. mental wellbeing, stress relief), leisure and recreation private clinics specializing in certain treatments	day/beauty spas spa and wellness hotels thermal leisure spas holistic activities (e.g. yoga, meditation, vinotherapy, occupational wellness, alpine wellness, selfness and mindness balneotherapy)
Northern Europe (Scandinavia, Baltic States)	Physical recreation Leisure and relaxation Lifestyle improvements (e.g. diet, exercise, fresh air)	Nordic wellbeing, saunas, outdoor recreation (e.g. Nordic walking), cold therapies (e.g. crypto therapy, ice swimming), hot geysers (Iceland), thermal, medical and seaside spas (Estonia, Latvia, Lithuania)
Central and Eastern Europe (Bosnia, Bulgaria, Croatia, Czech Republic, Hungary, Moldova, Poland, Romania, Russia, Serbia, Slovakia, Slovenia)	Curative rather than preventive health care therapy and rehabilitation for the body medical tourism Water-based leisure	Medical and thermal baths Spa hotels Caves Aquaparks Wellness hotels
Southern Europe (Cyprus, Greece, Italy, Malta, Portugal, Southern France, Spain, Turkey)	Physical recuperation and relaxation sea-water-based wellness lifestyle elements (e.g. climate, healthy cuisine, pace of life) MEDICAL TOURISM	Thalassotherapy Traditional thermal and medical spas Holistic retreats (often run by non-locals) Religious and spiritual tourism (e.g. Lourdes, Fatima, Santiago de Compostela)

Source: Puczkó, Smith 2009.



Contributions to Planet and Climate

21. Ecological footprint (2014): National Footprint Accounts, Ecological footprint (according to Global Footprint Network) relative to the size of the economy (negative indicator).
22. Environmental agreements compliance (2015): Percentage compliance to multilateral environmental agreements on hazardous waste, and other chemicals that meet their commitments and obligations in transmitting information as required by each relevant agreement.
23. Hazardous pesticides exports: Hazardous pesticides exports (according to UNEP Environmental Data Explorer) relative to the size of the economy (negative indicator).
24. Renewable energy share (2015): Renewable energy share in the total final energy consumption.
25. Ozone: Consumption of ozone-depleting substances - all (according to UNEP Environmental Data Explorer) relative to the size of the economy (negative indicator).

The idea of the Good Country Index is simple: to measure what each country on earth contributes to the common good of humanity, and what it takes away, relative to its size.

Contributions to Health and Wellbeing

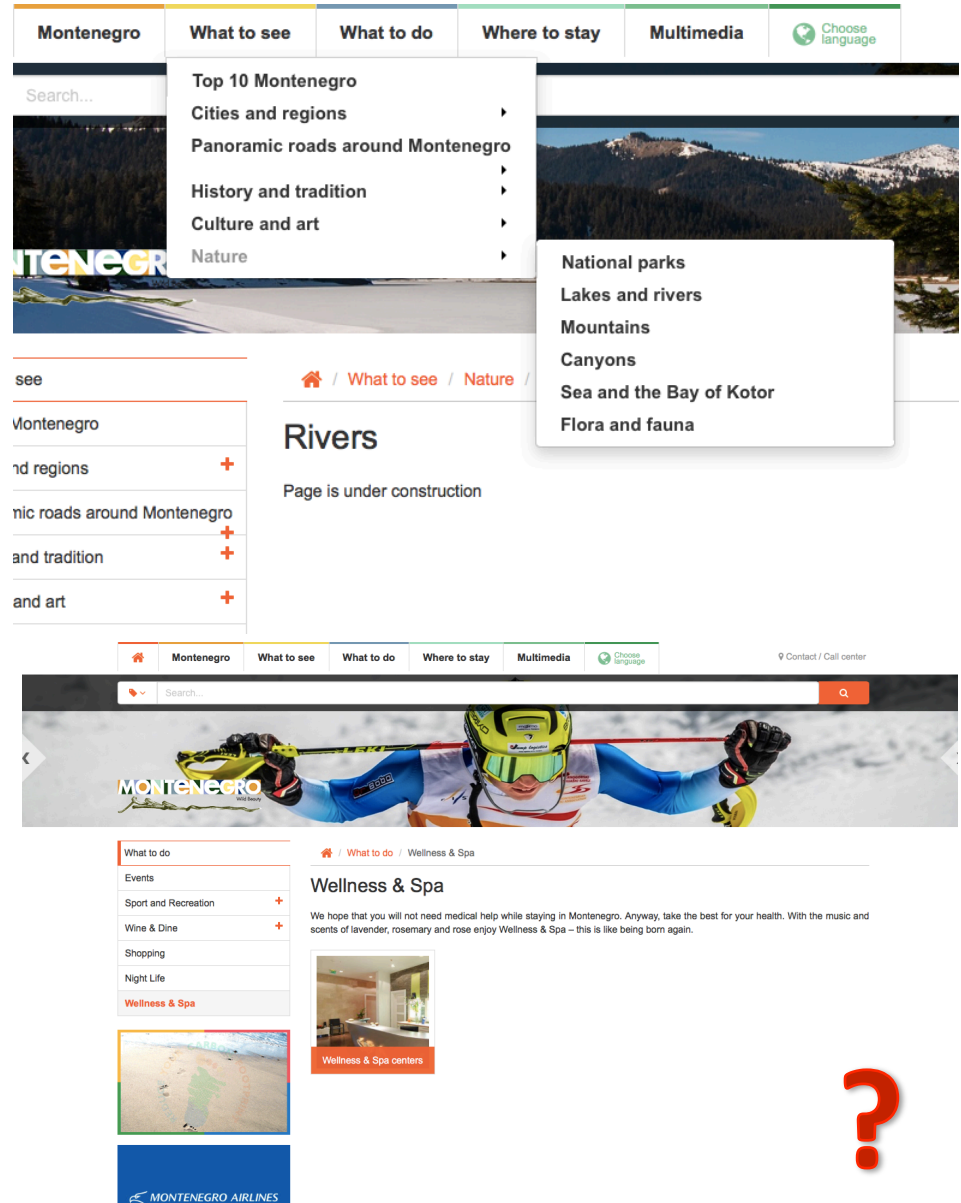
31. Food aid: Food aid funding (according to WFP) relative to the size of the economy.
32. Pharmaceutical exports: Exports of pharmaceuticals (according to ITC) relative to the size of the economy.
33. Voluntary excess donations to the WHO: Voluntary excess contributions to World Health Organisation relative to the size of the economy.
34. Humanitarian aid donations: Humanitarian aid contributions (according to UNOCHA) relative to the size of the economy.
35. International Health Regulations Compliance: International Health Regulations Compliance (according to WHO).

Sustainable and health **TOURISM**

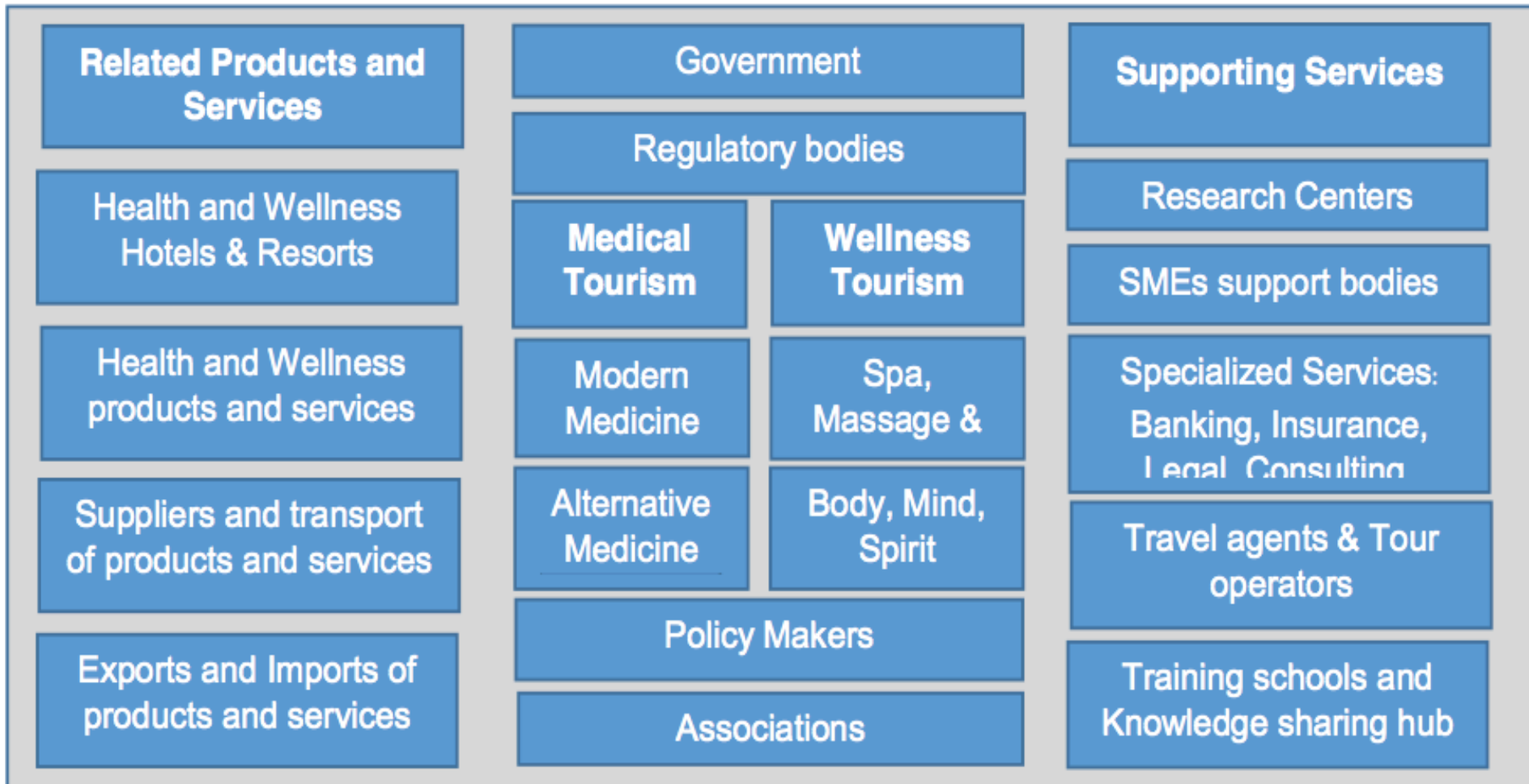


STRENGTHS

- diversity confined to a small area
- climate and geographic location
- natural values
- cultural and historic heritage
- hospitality of the local population
- food and beverages
- a large number of SMEs
- environment conducive to investments
- developed ITC infrastructure
- political stability
- good relations with neighbouring countries
- new emerging destination
- close to major European capitals



Key health tourism players (e.g. wellness)



Key potential actions/projects/solutions

first phase

- Destination – Segmentation Martix (dimensions: type of tourist/health tourist - assets/offer - destination)
- Flagship „experience package of Montenegro” (key differentiator, possibly combination of sustainable and health tourism) with an own brand name and story
- booking/communication/promotion e-platform

LET'S DISCUSS